

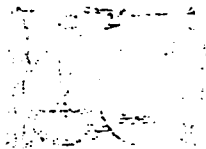
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FAX MEMORANDUM

TO: Jo Parrott & Christal Polk FAX NUMBER: 803/661-1165
FROM: Valerie Lenart PHONE NUMBER: 803/737-1871
DATE: 03/05/98

NUMBER OF PAGES (including cover page): 10

MESSAGE:

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AUG 11 2004

STATE DOCUMENTS

Hi Jo & Christal!

Here's a copy of my review comments.
We'll go page by page on Friday so I
can decipher my handwriting for you. Once
we review my questions you may make
some minor "tweaks" to your paper AND
THEN YOU ARE DONE! YEAH!

:- Valerie

Project Statement and Goal

In the Francis Marion University Office of Business Affairs-Accounting/Cashier there are six student employee positions. Each position requires the student to work at the counter in the Cashier's Office, the receptionist desk in the Accounting Office, and for specific staff members in individual areas within the office. Their job duties include collecting payments in the Cashier's Office, answering questions, answering the telephone, taking messages, word processing, filing, and other specific duties related to the areas to which they are assigned. The student employees are our front-line and are usually the first contact a customer has with our office. First impressions are lasting and we would like to make our first contact with a customer as pleasant as possible.

Students who enter Francis Marion University as freshmen and accept jobs in our office not only need training in office policies and procedures but in professionalism and self-discipline. For many, this is their first job and their first experience away from home. Initiative, responsibility, and self-discipline are often characteristics that must be further developed in the Accounting Office.

Since increasing the number of student employee positions to six, it has become impossible for one person to train each student in all areas. A student may receive only a day's training before being placed on the counter to handle payment transactions. This lack of close supervision has caused the students to become very frustrated. We have seen a significant increase during the past year of voided receipts due to errors, over and

shorts in petty cash, documents misfiled, and incidents where incorrect information was given out. The student employees are receiving information from all areas which is sometimes conflicting. Full time employees are also spending a great deal of time and effort correcting the mistakes made by the students.

When discussing errors with our student employees, the majority of the time the students feel they are not receiving proper instructions or they are not trained to handle the procedure. Many times we find that in giving proper instructions, we sometimes relay them hastily with no explanation or appropriate follow-up. Because of the cyclical nature of many office responsibilities (i.e. registration, year-end close-out, audits) student employees are often first confronted with tasks when demand for services exceeds capacity and full-time employees do not have time to supervise.

Due to increasing demands for more services and information, in addition to budget cuts, we must utilize the resources available more efficiently and effectively. Student employees are a valuable resource that can be utilized more productively. The training methods currently used are inadequate for the number of students now employed and the frequency of turnover we experience. Though this will cost an estimated (3 hours x \$11 x 3 staff members) \$100 per week for 3 weeks, the benefits should outweigh the cost by saving valuable time in the long run.

Our goal is to increase the effective and efficient use of student employees by developing their training to the extent office inefficiencies will be reduced by 20% by the

end of the Spring 1998 semester. Inefficiencies will be measured by comparing the number of receipts voided, the number of checks accepted by student that are written incorrectly or not endorsed properly, and the number of over and short transactions over a six month period.

Cause Analysis

Increasing the number of students to six has become essential, but we are experiencing problems as a result. One person cannot train six students in all areas, so training is not always given by the same person, or with the same information. Students as a result, are experiencing more frequent receipt voids due to errors, overs, and shorts in petty cash. Counting and changing money appears to need some reinforcement due to over and shorts. Full time employees were spending much of their time correcting mistakes the students made. In order to resolve the problems, we had to research the counter training. Meeting were held with students to discover areas where they felt additional training was needed. We polled the student employees and the results were the students felt they had never been told what should be done in specific situations.

All areas of the Accounting Office need documents filed. The file room is complicated. The students need to be taught the specifics of filing by the individual responsible for the file. There are often two files for the same document but different purposes for each.

Incorrect information has been given out. When talking with students' parents about fees and fines we must be careful due to protective legislation for the student. We also must give accurate information concerning amounts due and research fully before explaining.

For special situations such as registration, we find students do not understand all procedures and even with instruction sheets, they give incorrect information. There is a lack of understanding of the overall process and how offices interact with each other.

The full-time staff are using much of their time doing tasks that students are capable of such as typing: (computer skills taught to student workers would be valuable in freeing-up staff time). A basic knowledge of formatting is needed due to the large number of memos required of this office. Also training is needed in Excel for accounting schedules and reports produced by this office.

Many times students feel that what they are doing is in agreement with the full-time employees instructions, but in reality the students are not completing tasks correctly. We have to communicate better both upward and downward.

Implementation Plan

Using the flow chart (see appendix 1), we have described activities, responsibilities, and expected times for completion. A detailed outline of our training sessions (see appendix 2) is also included assigning sections to appropriate employees and a time schedule for completing the training.

The Customer Service Development section of the training includes audio tapes we have available in our office. Students will be required to complete the series of tapes within the first three months of employment. A check sheet will be maintained by the Student Supervisor and reviewed at the end of each month. Students will be allowed to listen to the tapes during scheduled work-hours.

The Personal Computer Development section includes a series of classes offered free of charge each semester by the University's Coordinator of Instructional Technology. Students will be required to complete at least the first two levels of each unit during their first semester of employment. A check sheet will be maintained by the Student Supervisor and reviewed at the end of each month to ensure each student completed the courses. Students will be allowed to attend these classes during scheduled work-hours.

We have anticipated certain obstacles that may interrupt the implementation of student training. We have decided on strategies to overcome them as follows: If, in evaluating the students, they are being given negative information on performance, they may lose self confidence or give up on trying. If a student is told he/she did a poor job on

a particular task he/she may feel that no one thinks they are capable of doing the task. We should try to phrase criticism more carefully, instead say something like, "you've done a lot of work on this project, but there are a few things we need to change", and explain why the changes are needed. Try to present improvement methods to performance in positive ways.

The student policy on annual leave is to have approvals from the student supervisor and the staff person to whom the student is assigned. If the request for leave is denied, the student may get angry. The best way to handle this situation is to give him/her alternatives. If the student can find someone to fill in and it is not a crucial day, like registration, he/she may have the time off. His/her appointment may be able to be rescheduled. Try to work with them.

Students may be under the impression that they have privileges because of their student status. They may expect to have work responsibilities second to school responsibilities. They may expect to study on our time or request to participate in school activities when they are normally scheduled to work. We should explain prior to hiring students that they are accepting a real job and are expected to behave professionally, just like they would outside the University.

Setting aside time to train has been an obstacle and we anticipate it will be again; but with the training schedule we have tried to allow flexibility within each week to move times and days and still stay on schedule. Also, by assigning sessions to specific employees from the area instead of one person trying to do all the training, we hope to manage our time better and, hopefully, the students will receive better training. After the

program is implemented, it will become part of official policies and procedures for the office.

Evaluation Method

To evaluate the training, data will be collected on the number of voided receipts, the number of checks accepted that are written incorrectly, and the number of over/shorts due to student errors beginning the month of February and ending with the month of May.

Printouts of voided receipts are maintained daily with explanations and documentation that will be reviewed by the Director of Financial Services and Student Accounts and the Training Team each month.

The head cashier, who prepares the daily deposit, will maintain a record of checks accepted that are written wrong and who accepted the checks. This will be reviewed each week by the head cashier. If at the end of a week there are significant findings, the head cashier will review the problems with the individual student and document. Findings will be reviewed at the end of each month by the Training Team.

Over/shorts of petty cash and deposits are recorded daily and reported weekly by the head cashier to the Director of Financial Services and Student Accounts. If there is an over/short for the week, the daily tapes identifying the cash drawer and the employee responsible for the draw are attached to the report. This is reviewed weekly by the Director of Financial Services and Student Accounts. Any significant findings will be reviewed by the Training Team at the end of each month.

In certain situations errors will be brought to the student's attention by the supervisor as soon as the problem is discovered to eliminate multiple occurrences.

The Office of Business Affairs-Cashier conducts an annual customer survey (see appendix 3). Results from the October 1997 survey will be compared to results collected in October 1998. Results will be tabulated by the Accounts Receivable Accountant and reviewed by the Director of Financial Services and Student Accounts. Any significant findings will be reviewed by the Training Team. The voids and checks written wrong will be reviewed to determine the effectiveness of the training program and determine if our goal of 20% reduction in errors was met.

At the completion of each training section and at the end of the three week training program each student will be asked to complete an evaluation. Evaluations will be reviewed by the Training Team and recommendations/changes will be proposed to the Assistant Vice President for Accounting within two months of the completion of the training program.

The Student Handbook will be reviewed annually by the Office of Business Affairs-Accounting/Cashier staff and students. Recommendations will be made by the Student Supervisor to the Assistant Vice President for Accounting. The Student Handbook will be maintained and updated by the Student Supervisor.